

## E-Mail ALPERSRU M/00

### Subj: CGHRMS ASSIGNMENT DATA SYSTEM

Ref: (a) ALCOAST 327/00  
(b) Personnel and Pay Procedures Manual, HRSICINST M1000.2 (series)  
(c) SDA II User Manual, HRSICINST M5231.2

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**Introduction** This E-mail ALPERSRU provides PERSRU procedures for processing Assignment Data Worksheets, viewing pending TDY and PCS transfer information, and accessing the Enlisted Evaluations Database.

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**Discussion** The Self-Service Assignment Data System, announced in reference (a), can only be accessed from CGSWs-III. Until CGSWs-III is available CG-wide, PERSRUs are requested to provide the necessary support to ensure complete participation. Those units which do not have access to CGSWs-III at their unit, or a nearby support unit, shall forward the ADC worksheet (CG HRSIC-2002) to their PERSRU for entry into the electronic assignment system. Command Endorsement, for enlisted personnel only, shall be completed prior to submission to the PERSRU.

The ADC Worksheet is included in shopping lists ordered from CGPC's fax-on-demand system. It can be downloaded from the ADC Self-Service web site (<http://cghrms.osc.uscg.mil>) and HRSIC's web site (<http://www.uscg.mil/hq/hrsic/MSWordForms.htm>). The worksheet will also be included in the next change to reference (b).

The new system also provides access to pending transfer information and the Enlisted Evaluations Database, in addition to ADC information.

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**Directives Affected** Page 5-D-13 and enclosure (1) of reference (b) will be updated, in change 6, to reflect the new ADC process.

Pages 2-A-266 through 2-A-270 (Assignment Data Maintenance, L67B) of reference (c) are obsolete and will be removed in the next change.

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## E-Mail ALPERSRU M/00

### Subj: CGHRMS ASSIGNMENT DATA SYSTEM, Continued

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#### CGHRMS

The Coast Guard Human Resources Management System (CGHRMS) is being developed using PeopleSoft, a commercial off-the-shelf software product. CGHRMS will gradually replace SDA II and PMIS.

PERSRUs will enter assignment data information using CGHRMS, rather than the Self-service web site applications used by individual members and commands.

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#### Access to CGHRMS

Access to CGHRMS requires an operator ID (user name) and password issued by HRSIC (CST). All current SDA II users will be issued CGHRMS IDs and passwords. No action on the part of the PERSRU is required, HRSIC (CST) will automatically create accounts for PERSRU users in CGHRMS.

Operator IDs and initial passwords will consist of a combination of letters from the member's first name and last name, and the last four digits of the Employee ID Number (EMPLID). The Employee ID number can be found on the member's LES.

HRSIC (CST) will begin issuing CGHRMS IDs and passwords immediately.

- CGHRMS ID's will follow this format:  
XXYY1234 -- Where XX = The first two letters of the user's first name.  
YY = The first two letters of the user's last name.  
1234 = The last four digits of the member's EMPLID.

**Example:**  
John Smith's  
EMPLID is  
1109123.  
His Operator  
ID will be:  
**JOSM9123.**  
His password  
will be **P9123**

- The initial password will follow this format  
**P1234** -- Where 1234 = The last four digits of the member's EMPLID.
- The password must be changed upon initial use.
- CGHRMS accounts should be established for all PERSRU users by 01 September 2000.

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## E-Mail ALPERSRU M/00

### Subj: CGHRMS ASSIGNMENT DATA SYSTEM, Continued

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**Process Overview** This table describes the process to be used for manual ADCs.

Stage	Description
1	Member obtains shopping list and ADC Worksheet from CGPC's fax-on-demand system, or other source.
2	Member completes ADC Worksheet and forwards to Commanding Officer for endorsement.
3	Unit CO or designee reviews member's ADC Worksheet and completes endorsement.
4	Unit forwards worksheet to PERSRU.
5	PERSRU enters data from ADC Worksheet into CGHRMS.
6	PERSRU provides unit with a copy of the data entered into CGHRMS by printing the system-generated e-mail message and sending to unit via regular mail, or forwarding the system-generated e-mail directly to the unit's e-mail address (if unit has access to CTOS e-mail).
7	Assignment Officer reviews ADC, makes assignment decision and issues orders/extension.
8	PERSRU reviews transfer information using the "Airport Terminal" and notifies unit when member receives orders.

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**Data Entry Procedures** Enclosure (1) provides detailed procedures for entering ADC data into CGHRMS, using the Airport Terminal and viewing enlisted evaluations.

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**Questions** Questions may be directed to the HRSIC Customer Service Team (CST) at 785-357-3540.

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**Released by**

  
G. E. SENA  
Executive Officer

Encl: (1) PERSRU User's Guide to CGHRMS Assignment Data System

## PERSRU User's Guide to CGHRMS Assignment Data System

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**Introduction** This guide provides PERSRU users' step-by-step procedures to follow when entering an ADC Worksheet (CG HRSIC-2002) into CGHRMS. Instructions for using the Airport Terminal and viewing enlisted marks are also provided.

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**Before you begin** Before you start working with CGHRMS and PeopleSoft, you may find it helpful to take a brief tutorial that will familiarize you with the software. The tutorial, provided by PeopleSoft, can be accessed and run from within your web browser by navigating to:

<http://www.peoplesoft.com/en/us/services/education/pre-class/pre-class75/>

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**In this guide**

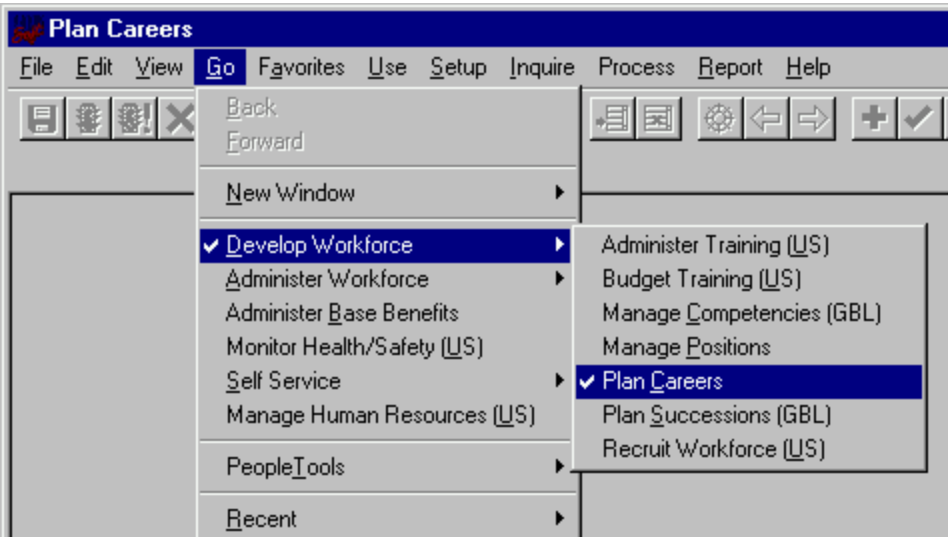
Topic	See Page
ADC Worksheet Processing	2
Using the Airport Terminal	10
Viewing Enlisted Evaluations	16

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## ADC Worksheet Processing

**Introduction** This section provides procedures for entering data from an ADC Worksheet into CGHRMS.

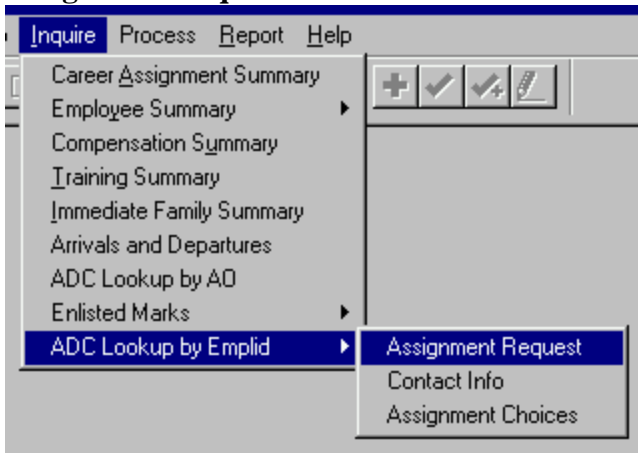
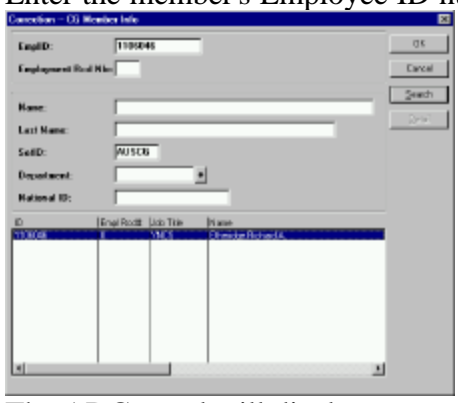
**Procedure** Upon receipt of a CG HRSIC-2002 complete the following steps.

Step	Action
1	Start PeopleSoft by choosing <b>Start &gt; Programs &gt; USCG Program Apps &gt; PeopleSoft.</b>
2	Enter your Operator ID and Password as issued by HRSIC (CST). Note: If this is your first logon click the <b>Set Password</b> button and change your assigned password. Click <b>OK</b> to continue.
3	From the People Tools menu bar choose <b>Go &gt; Develop Workforce &gt; Plan Careers.</b> 

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## ADC Worksheet Processing, Continued

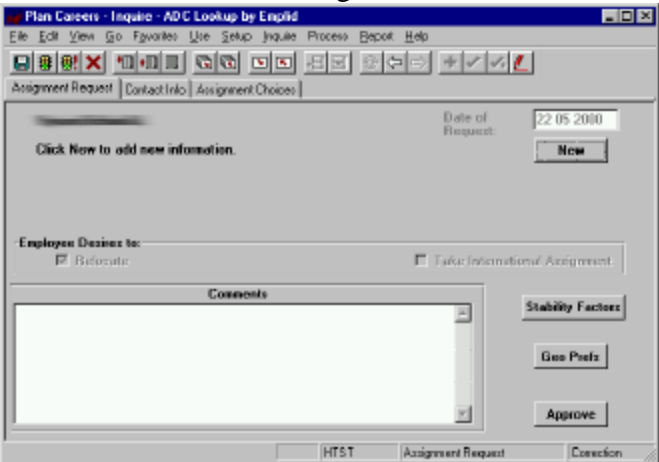
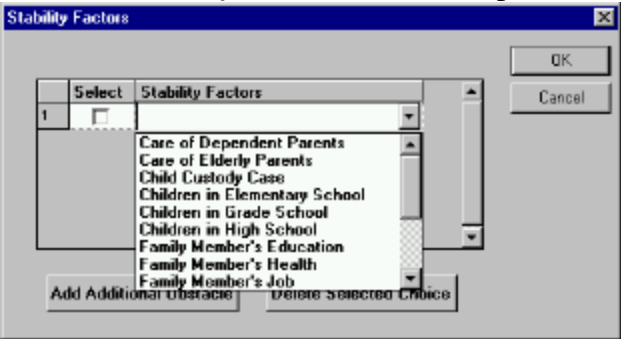
### Procedure (continued)

Step	Action
4	<p>From the People Tools menu bar choose <b>Inquire &gt; ADC Lookup by Emplid &gt; Assignment Request</b>.</p>  <p>A search panel will display</p>
5	<p>Enter the member's Employee ID number and click <b>OK</b>.</p>  <p>The ADC panel will display.</p>

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## ADC Worksheet Processing, Continued

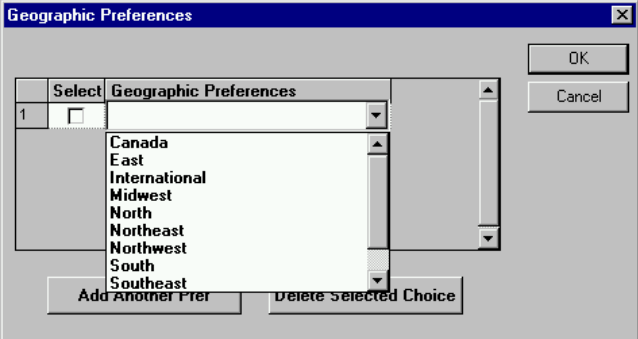
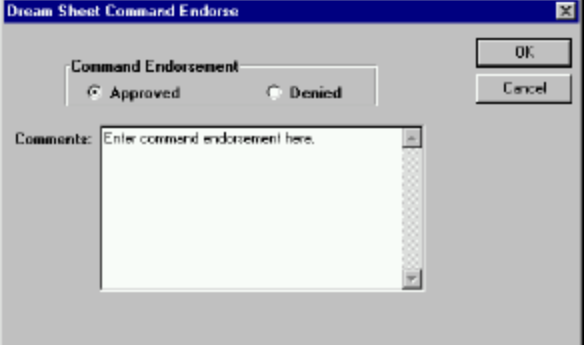
### Procedure (continued)

Step	Action
6	<p>Click on <b>New</b> button to begin a new ADC</p> 
7	<p>In the area beneath "<b>Employee Desires to:</b>" place check marks next to <b>Relocate</b> and <b>Take International Assignment</b> if these items were marked a "Yes" on the member's worksheet.</p>
8	<p>Click the <b>Stability Factors</b> button to open the Stability Factors panel.</p>  <ol style="list-style-type: none"> <li>1. Click the drop down arrow inside the empty block in the Stability Factors column to display the list of assignment concerns.</li> <li>2. Click on an item to add it to the ADC.</li> <li>3. Click on the <b>Add Additional Obstacle</b> button to add another concern.</li> <li>4. Repeat this procedure for each concern the member marked on the worksheet.</li> <li>5. Click <b>OK</b> after all assignment concerns have been entered.</li> </ol>

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## ADC Worksheet Processing, Continued

### Procedure (continued)


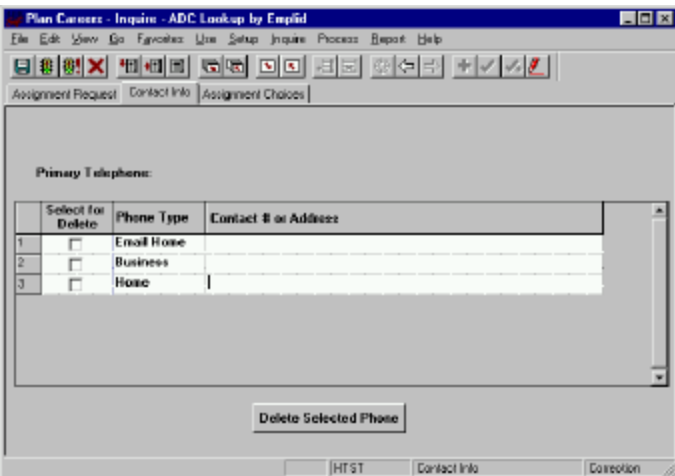
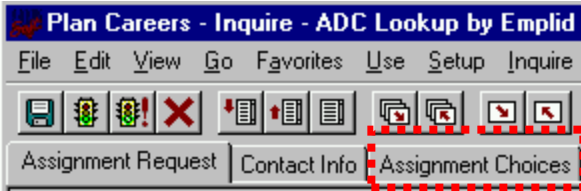
Step	Action
9	<p>Click on the <b>Geo Prefs</b> button to open the Geographic Preferences panel.</p>  <ol style="list-style-type: none"> <li>1. Click the drop down arrow inside the empty block in the Geographic Preferences column to display the list of geographic areas.</li> <li>2. Click on an item to add it to the ADC.</li> <li>3. Click on the <b>Add Another Pref</b> button to add another preference.</li> <li>4. Repeat this procedure for each preference the member marked on the worksheet.</li> <li>5. Click <b>OK</b> after all geographic preferences have been entered.</li> </ol>
10	Enter the member's comments in the space provided. Do not delete or overwrite the system-entered date information ("From ADC dated...").
11	<p>Click on <b>Approve</b> button to open the Command Endorsement panel.</p>  <p>Type the command comments in the space provided and click the <b>OK</b> button.</p>

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## ADC Worksheet Processing, Continued

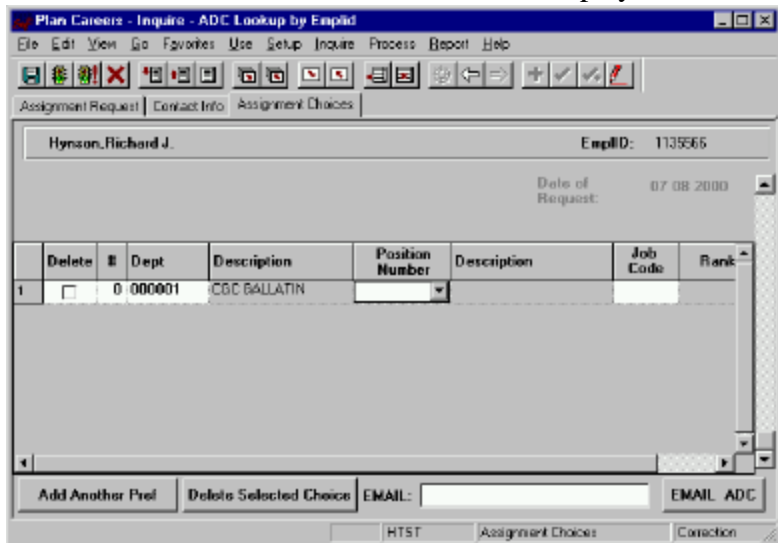
### Procedure (continued)

Step	Action
12	<p>Click on the <b>Contact Info</b> tab to open the Contact Information panel.</p> 
13	<p>Enter the member's contact information from the worksheet in the spaces provided.</p>  <p>Clicking in one of the blocks in the <b>Phone Type</b> column will display a list of different types of contact information, such a pager and cell phone numbers, which can be entered.</p>
14	<p>Click on the <b>Assignment Choices</b> tab to open the Assignment Choices panel.</p> 

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## ADC Worksheet Processing, Continued

### Procedure (continued)




Step	Action																					
15	<p>Enter the member's assignment choices:</p> <ol style="list-style-type: none"><li>1. Click in the <b>Dept</b> field and enter the Department ID number from the member's worksheet.</li><li>2. Enter the <b>Position Number</b> in the appropriate field.</li><li>3. The <b>Job Code</b> field should fill in automatically when you click in the field. If not, choose the code from the list that displays.</li></ol> <div></div> <p>Click on the <b>Add Another Pref</b> button to add more choices.</p> <p>To remove any choices added by mistake, click the box in the <b>Delete</b> column of the row you want to remove and click the <b>Delete Selected Choice</b> button. Click <b>OK</b> to confirm when prompted.</p>																					
16	<p>Click and drag to highlight the zero (0) in the number (#) column and change it to the number indicated by the member for the assignment preference order.</p> <table><tr><th></th><th>Delete</th><th>#</th><th>Dept</th><th>Description</th><th>Position Number</th><th>Description</th></tr><tr><td>1</td><td><input type="checkbox"/></td><td>1</td><td>000001</td><td>CGC GALLATIN</td><td>00030372</td><td>DUTY</td></tr><tr><td>2</td><td><input type="checkbox"/></td><td>2</td><td>000003</td><td>CGC VIGILANT</td><td>00001113</td><td>DUTY</td></tr></table>		Delete	#	Dept	Description	Position Number	Description	1	<input type="checkbox"/>	1	000001	CGC GALLATIN	00030372	DUTY	2	<input type="checkbox"/>	2	000003	CGC VIGILANT	00001113	DUTY
	Delete	#	Dept	Description	Position Number	Description																
1	<input type="checkbox"/>	1	000001	CGC GALLATIN	00030372	DUTY																
2	<input type="checkbox"/>	2	000003	CGC VIGILANT	00001113	DUTY																

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## ADC Worksheet Processing, Continued

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### Procedure (continued)

Step	Action
17	Choose <b>File</b> > <b>Save</b> or click on the  (Save Icon) on the menu bar to save your work.
18	<p>Use the EMAIL field to enter an e-mail address of a member, command, or yourself to e-mail a text version of the ADC.</p> <ul style="list-style-type: none"><li>• Send it to yourself, then print it and mail to the member or unit as verification of the data entry.</li><li>• Or, if the member/unit has access to e-mail (either CTOS-CGSWS II or internet), e-mail the ADC directly to them.</li></ul> <div data-bbox="332 835 1015 907"><p>The screenshot shows a text input field labeled 'EMAIL:' followed by a button labeled 'EMAIL ADC'.</p></div> <ul style="list-style-type: none"><li>• Click the <b>EMAIL ADC</b> button to send.</li><li>• Repeat this procedure to mail additional copies.</li></ul>
19	Click on the  (List Icon) on the menu bar to look up another member and begin a new ADC.
20	Choose <b>File</b> > <b>Exit</b> to close the application when you are finished processing ADCs.

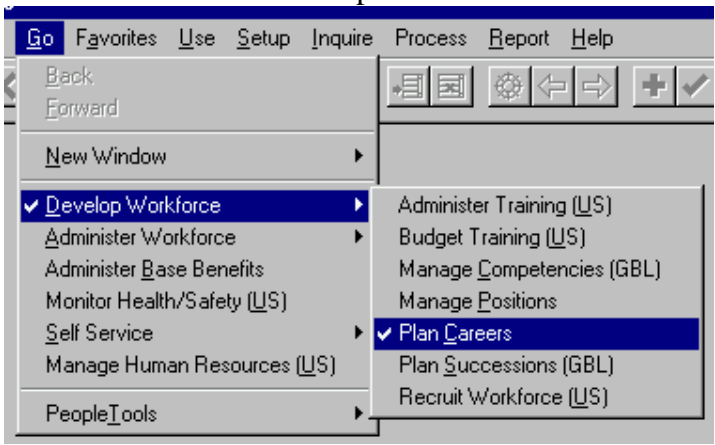
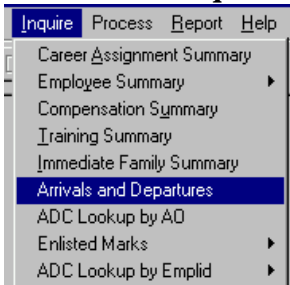
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<b>Department of Transportation</b> U. S. Coast Guard CG HRSIC-2002 (Rev. 08-00)		<h2 style="margin: 0;">CG Human Resources Management System</h2> <h3 style="margin: 0;">ADC Worksheet</h3>			
<p>• <b>PURPOSE:</b> Use this worksheet to update assignment data, including requests to be transferred.</p>					
1. EMPLID Number:		2. Name (Last, First, MI):			
3. Date:		4. Do you desire to relocate? <input type="checkbox"/> Yes <input type="checkbox"/> No		5. Do you desire an international assignment? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Assignment Concerns	<b>6. Stability Factors</b>		<b>7. Geographic Preferences:</b>		
	<input type="checkbox"/> Family Member's Education		1.		
	<input type="checkbox"/> Family Member's Health		2.		
	<input type="checkbox"/> Family Member's Job		3.		
	<input type="checkbox"/> Homeowner		4.		
	<input type="checkbox"/> Other		5.		
	<input type="checkbox"/> Prefer Current Location		6.		
8. Comments:					
Contact Information	9. Work Email address or other address you want the ADC acknowledgement sent to:				
	10. Home Email address:				
	11. Business Phone Number:				
	12. Home Phone Number:				
Assignment Choices	13. Department #	13a. Department Description	13b. Position Number	13c. Position Description	13d. Rank
	1.				
	2.				
	3.				
	4.				
	5.				
	6.				
	7.				
	8.				
	9.				
14. Member's Signature:		<b>PRIVACY ACT STATEMENT:</b> This information is requested under the authority of 37 USC 403 to determine future reassignment preferences. Disclosure of this information is voluntary. Failure to provide it could adversely affect job assignment opportunities.			
15. Commanding Officer's Comments:					
16. Commanding Officer Approval (Signature):				17. Date:	

## Using the Airport Terminal

**Introduction** The Airport Terminal provides PERSRUs and Command Users with the ability to view pending arrivals and departures of personnel and to view member job related information.

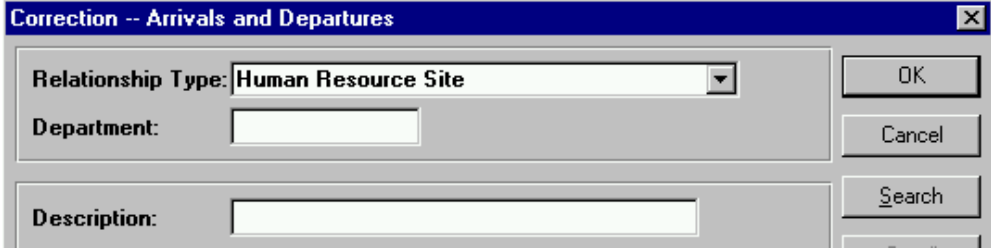
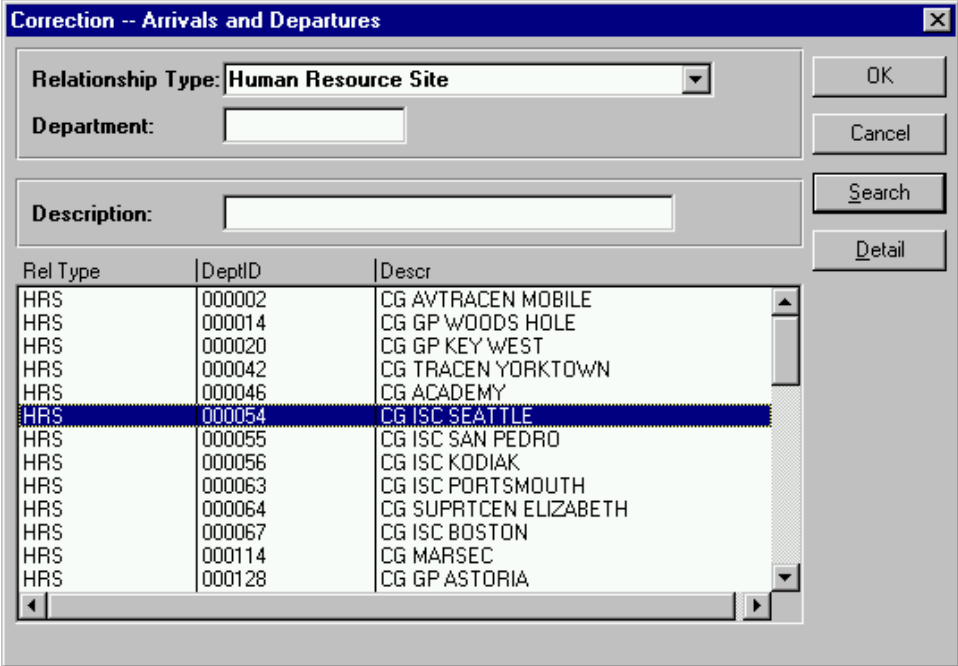
**Procedure** Follow these steps to access the Airport Terminal

Step	Action
1	Start PeopleSoft by choosing <b>Start &gt; Programs &gt; USCG Program Apps &gt; PeopleSoft.</b>
2	Enter your Operator ID and Password as issued by HRSIC (CST). Note: If this is your first logon click the <b>Set Password</b> button and change your assigned password. Click <b>OK</b> to continue.
3	<p>Navigate to the Airport Terminal by choosing <b>Go &gt; Develop Workforce &gt; Plan Careers</b> from the PeopleSoft menu bar.</p>  <p>Then choose <b>Inquire &gt; Arrivals and Departures</b>.</p>  <p>A search panel will display.</p>

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## Using the Airport Terminal, Continued


### Procedure (continued)

Step	Action
4	<p>If you know your PERSRU's Department ID number enter it in the <b>Department</b> field and click <b>OK</b>.</p>  <p>If you don't know the Department ID number, click the <b>Search</b> button and choose your PERSRU from the list.</p>  <p>Click <b>OK</b> to continue. The Arrivals and Departures panel will display.</p>

*Continued on next page*

## Using the Airport Terminal, Continued

### Procedure (continued)

Step	Action
5	<p>Click the:</p> <ul style="list-style-type: none"> <li><b>Arrivals</b> button to view information on personnel ordered into units serviced by your PERSRU.</li> <li><b>Departures</b> button to view information on personnel ordered out of units serviced by your PERSRU.</li> </ul> 

### Airport Terminal Data Fields

This table describes the data fields appearing in the Airport Terminal panel.

Field	Description or Purpose
Department	Department of employee logged into the PSoft system.
Arrivals	A person that has orders into the department.
Departures	Employees that are ordered out of the department.
Sel	Marks the item to be sent via e-mail to the address in the <b>Send to Email</b> field.
Operator ID	Operator ID of the person logged into the PSoft system.
From DeptID	Department ID member is departing from
Description	The name of the department the member is departing from
To DeptID	Department ID the member is ordered to.
Description	The name of the department the member is ordered to.
Est Departure Date	Estimated date of departure.
Est Report Date	Estimated date of arrival.
Emplid	Employee number of the person with the assignment.
Name	Name of the person with the assignment.
Short Description	The type of orders (PCS or TDY, and reporting or departing).
Position	Arrival is the "go to" position & departure is the "leaving from" position.
TONO	TONO number assigned to employee.
Send to Email:	Address to receive items chosen using the <b>Sel</b> field

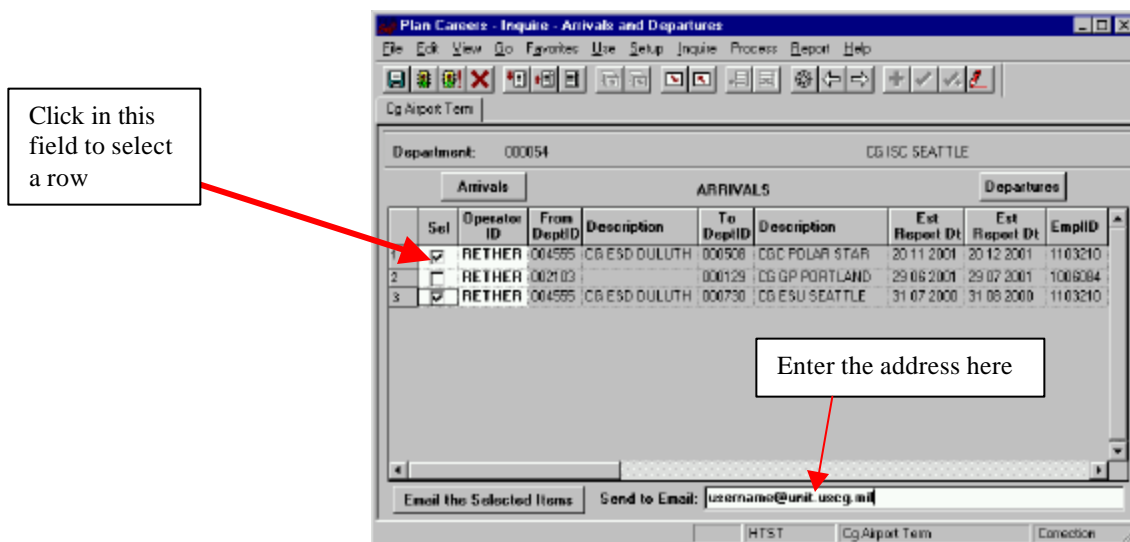
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## Using the Airport Terminal, Continued

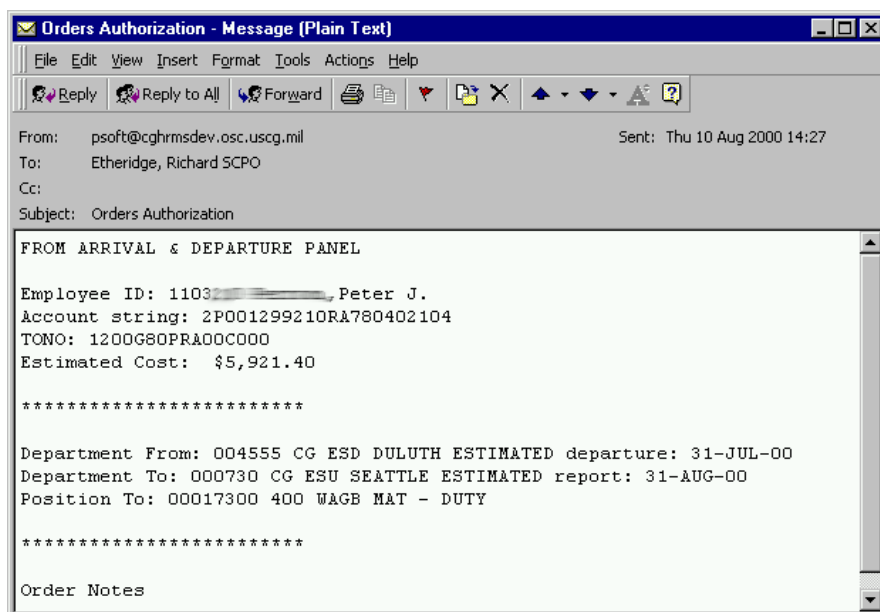
### How to Send Airport Terminal Data by E-mail

Use the Airport Terminal's e-mail feature to notify members and units of pending transfers.

1. Check the box in **Sel** column in any row to select that information.
2. E-mail the selected rows by entering an e-mail address in the space provided and clicking on the **Email the Selected Items** button.



The addressee will receive the an e-mail message like the one shown below:



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## Using the Airport Terminal, Continued

### Sorting Airport Terminal Data

Double click in a column title to sort the table by that column.

Example: To sort the view by the Employee ID number, double click on the column header labeled "**EmplID**".

DEPARTURES				Departures
To DeptID	Description	Est Report Dt	Est Report Dt	EmplID
		24 07 2000	25 07 2000	1000010
		13 08 2000	14 08 2000	1000067
		09 06 2000	10 06 2000	1000283
000129	CG GP PORTLAND	29 06 2001	29 07 2001	1006084
002191	MSO PHIL COMMAN	01 06 2001	01 07 2001	1036386
		24 07 2000	25 07 2000	1103901
		24 07 2000	25 07 2000	1103901

Double clicking here sorted the table by the employee ID number.

### Copying Airport Terminal Data to Other Applications

You can copy the table's contents from PeopleSoft to another application, such as Microsoft Excel. This is a good way to obtain a printout of the data.

Note: Only the table data is copied. The table heading rows will not be copied.

1. Click on the empty gray square at the top left corner of the table (next to the **Sel** Column Heading and above the row numbers).

Click here to select the table

Arrivals			
	Sel	Operator ID	From DeptID
1	<input type="checkbox"/>	RETHEP	004551

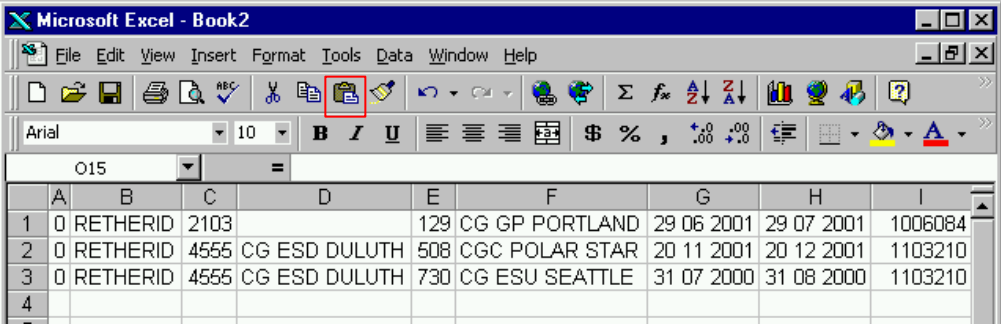
2. Press **Ctrl + C** on the keyboard (Hold down the **Control Key** while pressing the letter "**C**"), this is the keyboard shortcut for the Copy Command.
3. Start the application you wish to copy the information to (in this example we use Microsoft Excel).
4. Position the mouse pointer where you want the table pasted and press **Ctrl + V**, or click the paste icon on the menu bar.

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# Using the Airport Terminal, Continued

Copying  
Airport  
Terminal Data  
to Other  
Applications  
(cont'd)

Data from the Airport Terminal will now be displayed in the application.



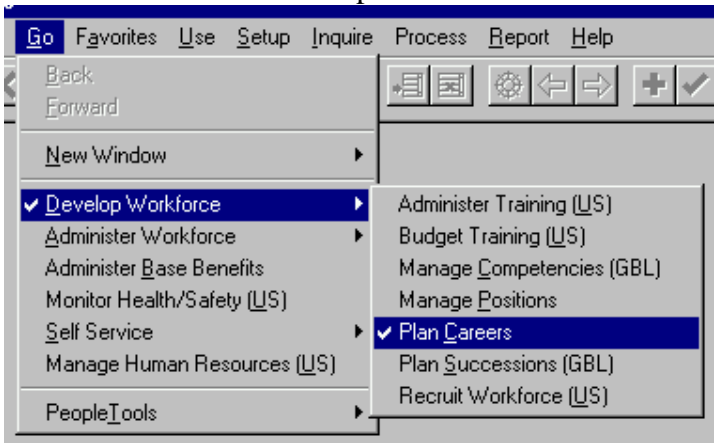
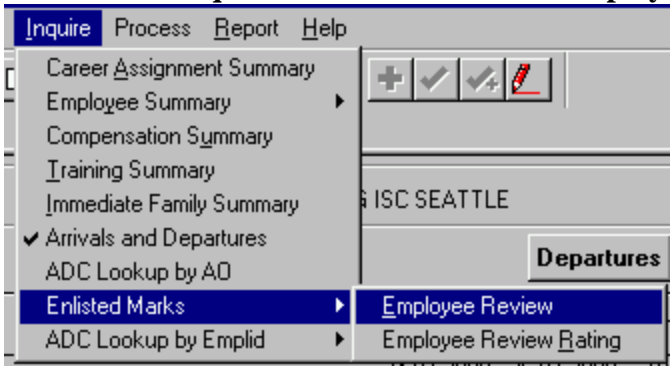
The screenshot shows the Microsoft Excel application window titled "Microsoft Excel - Book2". The menu bar includes File, Edit, View, Insert, Format, Tools, Data, Window, and Help. The toolbar contains various icons, with the "Copy" icon (two overlapping sheets) highlighted by a red rectangular box. Below the toolbar, the formula bar shows "O15" and an equals sign. The spreadsheet grid displays data in columns A through I. The first three rows contain data, while the fourth row is empty.

	A	B	C	D	E	F	G	H	I
1	0	REHERID	2103		129	CG GP PORTLAND	29 06 2001	29 07 2001	1006084
2	0	REHERID	4555	CG ESD DULUTH	508	CGC POLAR STAR	20 11 2001	20 12 2001	1103210
3	0	REHERID	4555	CG ESD DULUTH	730	CG ESU SEATTLE	31 07 2000	31 08 2000	1103210
4									

## Viewing Enlisted Evaluations

**Introduction** The Enlisted Evaluations module of the CGHRMS provides PERSRUs and Command Users with the ability to view an enlisted member's marks history.

**Procedure** Follow these steps to view an enlisted member's marks.

Step	Action
1	Start People Tools by double clicking on the desktop shortcut or choosing <b>Start &gt; Programs &gt; USCG Program Apps &gt; PeopleSoft HR 7.5 &gt; People Tools.</b>
2	Enter your Operator ID and Password as issued by HRSIC (CST). Note: If this is your first logon click the <b>Set Password</b> button and change your assigned password. Click <b>OK</b> to continue.
3	<p>Navigate to the Enlisted Evaluations Database by choosing <b>Go &gt; Develop Workforce &gt; Plan Careers</b> from the PeopleSoft menu bar.</p>  <p>Then choose <b>Inquire &gt; Enlisted Marks &gt; Employee Review</b>.</p>  <p>A search panel will display.</p>

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# Viewing Enlisted Evaluations, Continued

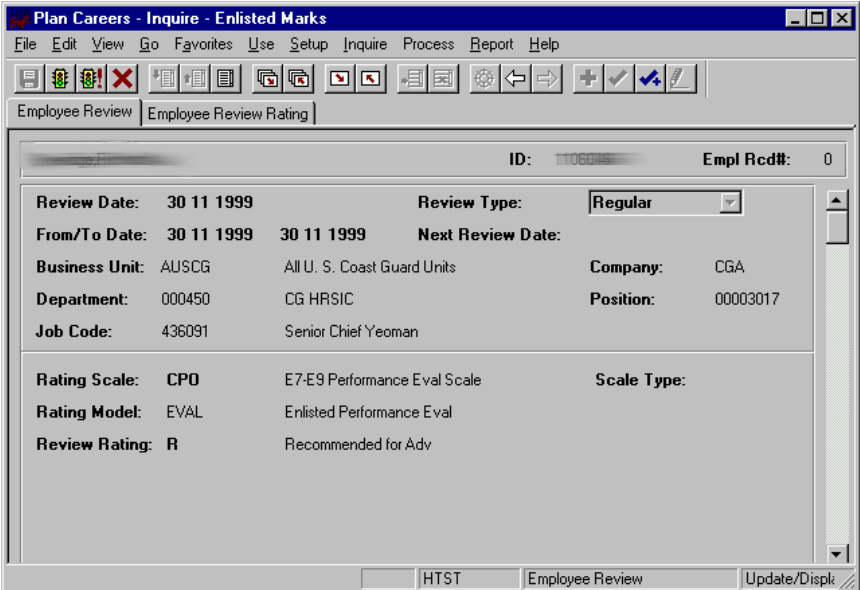
Procedure (continued)

Step	Action								
4	<div><p>Enter the member's employee ID number in the <b>EmplID</b> field and click the <b>OK</b> button.</p><div><div>Update/Display All -- Enlisted Marks</div><div><div><div>EmplID:</div><div></div></div><div><div>Employment Rcd Nbr:</div><div></div></div></div><div><div><div>Name:</div><div></div></div><div><div>Last Name:</div><div></div></div><div><div>SetID:</div><div>AUSCG</div></div><div><div>Department:</div><div></div></div><div><div>National ID:</div><div></div></div></div><div><div>OK</div><div>Cancel</div><div>Search</div><div>Detail</div></div></div><div><table><tr><th>ID</th><th>Empl Rcd#</th><th>Job Title</th><th>Name</th></tr><tr><td></td><td></td><td></td><td></td></tr></table></div></div> <p>Use the Search button to locate a member's employee ID if necessary.</p>	ID	Empl Rcd#	Job Title	Name				
ID	Empl Rcd#	Job Title	Name						

Continued on next page

## Viewing Enlisted Evaluations, Continued

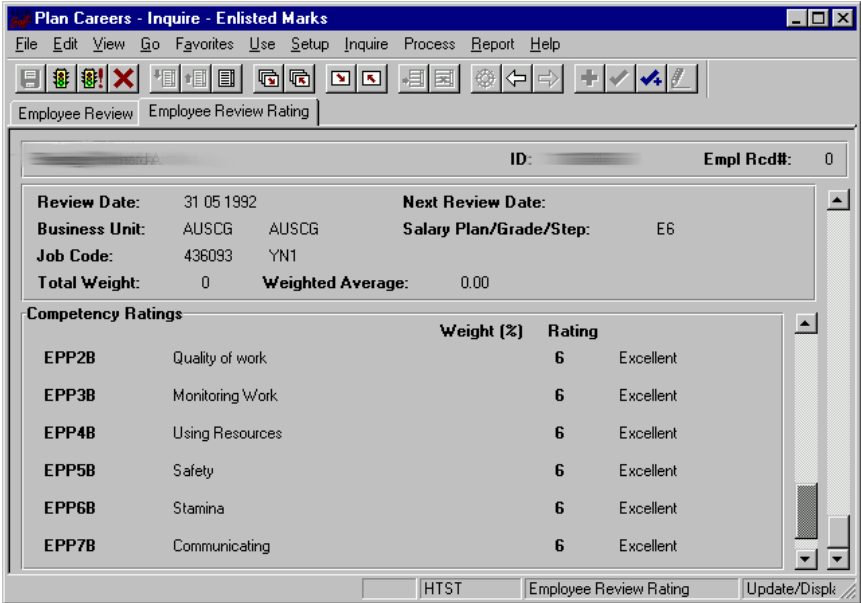


### Procedure (continued)

Step	Action
5	<p>The first tab (Employee Review) will display.</p> <ul style="list-style-type: none"> <li>• Use the scroll bar at the right of the panel to change evaluation periods.</li> <li>• As you use the scroll bar to change between available evaluations, the <b>Review Date</b>, <b>From/To Date</b>, <b>Review Type</b>, <b>Rating Scale</b> and <b>Review Rating</b> fields will change for each evaluation period.</li> </ul> 

*Continued on next page*

## Viewing Enlisted Evaluations, Continued

### Procedure (continued)

Step	Action
6	<p>Click on the <b>Employee Review Rating</b> tab to view an evaluation.</p>  <ul style="list-style-type: none"> <li>• Use the inner scroll bar to scroll through the list of factors</li> <li>• Use the outer scroll bar to view an evaluation from a different period</li> <li>• The Competency Ratings fields correspond to the factors on the Enlisted Evaluation Form (CG-3788/series).</li> </ul>
7	<p>If you want to view another member's marks, click the Update/Display Icon  on the menu bar to open the search panel and enter an employee ID number.</p>
8	<p>Click the Cancel Icon  on the menu bar when you have finished viewing marks.</p>